



Pew & Internet American Life PROJECT

PEW INTERNET PROJECT DATA MEMO

BY: Director Lee Rainie and Research Specialist Mary Madden (202-296-0019)
RE: Preliminary findings from a Web survey of musicians and songwriters
DATE: May 2004

Between March 15 and April 15 of this year, 2,755 musicians and songwriters responded to a Web-based survey about the way they use the Internet and their views on a host of public policy questions related to copyright and music file-sharing on the Internet.¹

The sample for this survey is not representative or projectable to the entire population of musicians and songwriters. However, it brings many more voices into the debates about copyright laws, the impact of online music swapping, and the long-term prospects for the music industry.

The Pew Internet & American Life Project would like to thank the following music organizations for allowing us to recruit their members to participate in our online survey of music makers: The Future of Music Coalition, Just Plain Folks, the American Federation of Television and Radio Artists, CD Baby, the Nashville Songwriters Association, Garageband.com, the American Society of Composers, Authors and Publishers, and the American Federation of Musicians. The views expressed by those who responded to our survey do not necessarily represent the views of these organizations or their members.

Here are some of the highlights of the survey that will be presented on May 2 at the Future of Music Coalition Policy Summit:

Musicians are sharply divided about the impact of file sharing on the music business

An online survey of 2,755 musicians and songwriters shows they are quite divided in their opinions about the impact of music file sharing by Internet users. There is no clear consensus regarding the effects of online file-sharing on artists.

¹ The total sample includes 2,793 musicians, songwriters and music publishers, however, the data included in this report is based exclusively on questions that were asked of musicians and songwriters (n=2,755).

Some 35% of this sample agree with the statement that file-sharing services are *not bad* for artists because they help promote and distribute an artist's work; 23% agree with the statement that file-sharing services *are bad* for artists because they allow people to copy an artist's work without permission or payment. And 35% of those surveyed agree with *both* statements.

When asked what impact free downloading on the Internet has had on their careers as musicians, 37% say free downloading has not really made a difference, 35% say it has helped and 8% say it has both helped and hurt their career. Only 5% say free downloading has exclusively hurt their career and 15% of the respondents say they don't know.

Asked whether online music file-sharing has made it harder to protect their music from piracy, 16% say the Internet has had a big effect in allowing piracy of their music, 21% say it has had a small effect, and 41% say it has had no effect.

Who should be held responsible for illegal file sharing online? The verdict is very split: 37% of the sample said both those who run file-sharing services and individuals who swap files through those services should be held responsible. But 21% said no one should be held responsible. Some 17% said those that run peer-to-peer services should exclusively bear the legal burden and 12% said individuals who swap files should exclusively bear the burden.

Yet, regardless of their personal experiences, most musicians and songwriters think file-sharing on the Internet poses *some* threat to creative industries that make music and movies. One-third say file-sharing poses a "major threat" to these industries while one-third say it poses a "minor threat." Another third say file-sharing poses "no threat at all" and 7% say they don't know.

67% say artists should have complete control over material they copyright and they say copyright laws do a good job of protecting artists

Two-thirds of these artists say copyright holders should have complete control over a piece of art once it is produced. Some 28% say the copyright holder should have "some control" and 3% say the holder should have "very little control."

Fully 61% of those in this sample believe that current copyright laws do a good job of protecting artists' rights, but 59% also say that copyright laws do more to protect those who sell art than to protect the artists themselves.

Most of the musicians and songwriters sampled do not believe current copyright laws "unfairly limit public access to art." Some 46% disagree with this statement and 21% strongly disagree. However, 15% do agree that current laws unfairly limit public access to art, 8% strongly agree and 10% say they don't know.

Half of the musicians and songwriters surveyed say they would be bothered if someone

put a digital copy of their music on the Internet without permission (compared to 37% who say they would not be bothered and 12% who say they don't know). Some 28% said they had experienced this situation firsthand.

83% have provided free samples of their work online and significant numbers say free downloading has helped them sell CDs and increase the crowds at concerts

As for their own careers, more of these artists say free music downloading online has helped them than hurt them. Fully 83% of those in the survey say they provide free samples or previews of their music online. And strong pluralities say free downloading has a payoff for them. For instance, 35% of them say free downloading has helped their careers and only 5% say it has hurt. Some 30% say free downloading has helped increase attendance at their concerts, 21% say it has helped them sell CDs or other merchandise; and 19% say it has helped them gain radio playing time for their music. Only fractions of them cite any negative impact of downloading on those aspects of their work.

Many musicians and songwriters do not think the RIAA campaign against free file sharing on the Internet will benefit them

The survey shows that many musicians do not think the recording industry efforts to halt the free sharing of music on the Internet will benefit those who create and perform music.

Some 60% of those in the sample say they do not think the Recording Industry Association of America's suits against online music swappers will benefit musicians and songwriters. Those who earn the majority of their income from music are more inclined than "starving musicians" to back the RIAA, but even those very committed musicians do not believe the RIAA campaign will help them. Some 42% of those who earn most of their income from their music do not think the RIAA legal efforts will help them, while 35% think those legal challenges will ultimately benefit them.

These are some of the highlights of a large-scale online survey of musicians and songwriters conducted between March 15 and April 15. While the sample for this survey is not representative or projectable to the entire population of musicians and songwriters, it brings many more voices into the debates about copyright laws, the impact of online music swapping, and the long-term prospects for the music industry.

These preliminary results will be reported at the Future of Music Coalition conference in Washington, D.C. this weekend. Additional analysis of this data will be conducted for forthcoming reports.

The composition of the sample

Most of the respondents have other jobs in addition to their work as in music. So, the answers reported in this survey come from a poorer and less professional segment of the

music community than is often represented in the discussions that have raged around Washington about copyright and downloading.

Here is a summary of basic demographic information about the respondents included in our sample:

Gender

- 74% Men
- 23% Women

Age

- 24% are aged 18-29
- 47% are aged 30-49
- 16% are aged 50-64
- 1% are aged 65 or older

Music occupation

- 53% consider themselves to primarily be songwriters
- 44% consider themselves to primarily be musical performers

Percentage of annual income earned from being a songwriter or musical performer

- 8% earn 100% of their income from their music endeavors
- 8% earn 60%-99% of their income from music
- 12% earn 20%-59% of their income from music
- 41% earn 1%-19% of their income from music
- 25% earn no significant income from their music

About The Pew Internet & American Life Project

The Pew Internet & American Life Project is a non-profit initiative, fully-funded by The Pew Charitable Trusts to explore the impact of the Internet on children, families, communities, health care, schools, the work place, and civic/political life. The Project is non-partisan and does not advocate for any policy outcomes. For more information, please visit our Web site: <http://www.pewinternet.org/>.

Musician Web Survey EXCERPT

Topline

4/23/04

Data for March 15 – April 15, 2004

Princeton Survey Research Associates
for the Pew Internet & American Life Project

Sample: $n = 2,793$ musicians, songwriters and music publishers
Interviewing dates: 03.15.04 – 04.15.04

NOTE: The survey results are based on a non-random online sample of 2,793 musicians, songwriters and music publishers, recruited via email notices sent to members of various music organizations, through announcements on those organizations' websites that provided a direct link to the survey, and through flyers distributed at several musicians' conferences. Since the data are based on a non-random sample, a margin of error cannot be computed, and the results are not projectable to the entire population of musicians, songwriters, and music publishers.

Has the Internet ... made it harder to protect your music from piracy or unlawful use?

| | BIG EFFECT | SMALL EFFECT | NO EFFECT | THIS ITEM DOES NOT APPLY TO ME | DON'T KNOW/ REFUSED |
|--|------------|--------------|-----------|--------------------------------|---------------------|
| h Made it harder to protect your music from piracy or unlawful use | 16% | 21% | 41% | 22% | n/a |

Has free downloading on the Internet increased, decreased, or not really affected...

| | INCREASED | DECREASED | NO EFFECT | THIS ITEM DOESN'T APPLY TO ME | DON'T KNOW |
|--|-----------|-----------|-----------|-------------------------------|------------|
| Sale of your CDs or other merchandise | 21% | 5% | 34% | 25% | 14% |
| Radio play of your music | 19 | 1 | 39 | 28 | 13 |
| Attendance at your own concerts or live performances | 30 | * | 29 | 27 | 13 |

In general, would you say that free downloading on the Internet has helped your career as a musician, hurt your career, or not really made any difference?

| | CURRENT | |
|---|---------|--|
| % | 35 | Free downloading has helped my career |
| | 5 | Free downloading has hurt my career |
| | 37 | Free downloading has not really made any difference in my career |
| | 8 | Free downloading has both helped and hurt my career |
| | 15 | Don't know |

If someone put a digital copy of your music on the Internet without your permission, would this bother you or not?

| <u>CURRENT</u> | | |
|----------------|----|-------------------------|
| % | 51 | Yes, would bother me |
| | 37 | No, would not bother me |
| | 12 | Don't know |

As far as you know, has someone ever put a digital copy of your music on the Internet without your permission?

| <u>CURRENT</u> | | |
|----------------|-----|------------|
| % | 28 | Yes |
| | 72 | No |
| | n/a | Don't know |

Overall, do you think file sharing on the Internet poses a MAJOR threat to creative industries like music and movies, a MINOR threat, or that it poses no real threat at all?

| <u>CURRENT</u> | | |
|----------------|----|-----------------------|
| % | 30 | Major threat |
| | 32 | Minor threat |
| | 31 | No real threat at all |
| | 7 | Don't know |

Which of the following statements comes closest to your own opinion, even if neither is exactly right?

| <u>CURRENT</u> | | |
|----------------|----|---|
| % | 23 | File sharing services are bad for artists because they allow people to copy or use an artist's work without getting permission or compensating the artist |
| | 35 | File sharing services aren't really bad for artists, since they help promote and distribute an artist's work to a broad audience |
| | 35 | I agree with both of these statements equally |
| | 3 | I disagree with both of these statements |
| | 4 | Don't know |

Once a piece of art is produced and copyrighted—whether it is a song, a painting, a quilt or a sculpture—how much control do you think the copyright owner should have over its use?

| <u>CURRENT</u> | | |
|----------------|----|---------------------|
| % | 67 | Complete control |
| | 28 | Some control |
| | 3 | Very little control |
| | 2 | Don't know |

Do you strongly agree, agree, disagree or strongly disagree with each of the following statements about current copyright laws...

| | <u>STRONGLY AGREE</u> | <u>AGREE</u> | <u>DISAGREE</u> | <u>STRONGLY DISAGREE</u> | <u>DON'T KNOW</u> |
|---|---------------------------|--------------|-----------------|------------------------------|-----------------------|
| Copyright laws do a good job of protecting artists' rights | | | | | |
| Current: | 11 | 50 | 22 | 6 | 10 |
| Copyright laws unfairly limit public access to art | | | | | |
| Current: | 8 | 15 | 46 | 21 | 10 |
| Copyright laws do more to protect those who sell art than to protect the artists themselves | | | | | |
| Current: | 32 | 27 | 17 | 3 | 21 |

Under current law, the copyright for a piece of art lasts for the artist's lifetime and then for 70 years more. Once a copyright expires, the work enters the public domain and anyone can use it. Do you think the current length of copyright terms is...?

| <u>CURRENT</u> | | |
|----------------|----|------------------|
| % | 29 | Too long |
| | 13 | Too short |
| | 47 | Just about right |
| | 11 | Don't know |

As you may know, the Recording Industry Association of America, RIAA, has begun taking legal action against individuals who are sharing large numbers of music files online without permission from the copyright holder. Who do you think should be held responsible for unlawful file sharing that happens online?

| CURRENT | | |
|---------|----|--|
| % | 12 | The individuals who are sharing the music files |
| | 17 | The companies that own and operate file-sharing networks like Kazaa |
| | 37 | The individuals and the companies should both be held responsible |
| | 3 | Neither the individuals or the companies – someone else should be held responsible |
| | 21 | No one should be held responsible |
| | 9 | Don't know |

Do you think the RIAA's recent legal action against individual downloaders will ultimately benefit musicians and songwriters?

| CURRENT | | |
|---------|----|------------|
| % | 22 | Yes |
| | 60 | No |
| | 18 | Don't know |

Current technology makes it possible to "copy-protect" digital forms of music such as CDs and audio files so that unauthorized copies cannot be made. If you had the choice, would you want your music to be copy-protected so that digital copies could not be made without your permission?

| CURRENT | | |
|---------|----|------------|
| % | 44 | Yes |
| | 44 | No |
| | 12 | Don't know |

Some people intentionally break or disable the copy protection mechanism on the CDs and DVDs they purchase. Do you think people who do this should be prosecuted for copyright infringement?

| CURRENT | | |
|---------|----|------------|
| % | 35 | Yes |
| | 46 | No |
| | 19 | Don't know |

Methodology

Musician Web Survey

Prepared by Princeton Survey Research Associates International
for the Pew Internet & American Life Project

April 2004

SUMMARY

The Musician Web Survey, sponsored by the Pew Internet & American Life Project, obtained online interviews with a non-random sample of 2,793 musicians, songwriters and music publishers. The interviews were conducted online, via WebSurveyor, from March 15 to April 15, 2004. Details on the design, execution and analysis of the survey are discussed below.

Sample Design/Contact Procedures

Sample was recruited via email invitations to the current membership/subscriber lists of the following music organizations:

- The Future of Music Coalition
- Just Plain Folks
- American Federation of Television and Radio Artists
- CD Baby
- Nashville Songwriters Association
- Garageband.com
- American Society of Composers, Authors and Publishers
- American Federation of Musicians

Altogether, email invitations to participate in the survey were sent to approximately 300,000 members of these various organizations. These invitations provided a direct link to the survey, and contained the following language:

Dear Members,

[ORGANIZATION NAME HERE] has been working in partnership with the Future of Music Coalition, the Pew Internet & American Life Project and an array of other musician-based organizations to design a balanced survey that will give musicians, performers and songwriters a chance to speak up about the Internet, file-sharing, and copyright issues. We all know that new technologies have created many complex challenges as well as many new opportunities for musicians, yet we often hear more about how businesses and consumers are responding to these changes at the expense of understanding how artists think and feel about these issues.

Now's the time to make your voice heard.

We invite you to take about 20 minutes of your time to share your opinions and experiences through this important survey.

Visit <http://websurveyor.net/wsb.dll/11719/Music.htm> from March 15 – April 15, 2004 to participate.

Your contribution will have a valuable impact, as the findings from this survey will be widely circulated and discussed.

Don't miss this great opportunity to speak up on behalf of artists!

Sincerely,
[ORGANIZATION REP]

In addition to sending email invitations to their members, The Future of Music Coalition, Garageband.com and The American Federation of Television and Radio Artists posted a notice about the survey on their websites that provided a direct link to the survey front page. The Future of Music Coalition also printed flyers announcing the survey, including the URL, and distributed them at several musicians' conferences held during the survey field period. Both the website postings and the flyers contained the following text:

Musicians, performers, and songwriters: What do you think about peer-to-peer file-sharing and music on the Internet?

How has the Internet impacted the way you create, promote, or distribute your music?

[ORGANIZATION NAME HERE] has been working in partnership with the Future of Music Coalition, the Pew Internet & American Life Project and an array of other musician-based organizations to design a balanced survey that will give musicians, performers and songwriters a chance to speak up about the Internet, file-sharing, and copyright issues.

We've all heard speculations about what musicians are "really thinking" in the changing digital landscape. Yet, from our vantage point inside the music community these projections have always seemed too narrow to represent the complex concerns we regularly experience in our discussions with musicians.

It's time to stop projecting our thoughts and preferences onto musicians and, instead, ask musicians to share their own experiences and opinions.

To that end, CD Baby, Just Plain Folks, Nashville Songwriters Association, AFTRA, and AFM, the Future of Music Coalition and the Pew Internet & American Life Project have designed an online survey that asks musicians a variety of questions about music, technology, copyright, peer-to-peer filesharing, emerging best practices, and the public domain.

We urge musicians, songwriters and performers of all types to take this online survey so we can better understand the complexity of these changes and the diversity of our community.

Visit <http://websurveyor.net/wsb.dll/11719/Music.htm> from March 15 – April 15, 2004 to participate.

When the survey is complete the results will be published and distributed to those who have a critical stake in the current debate. We hope they will open another channel in the discussions about how music will be enjoyed, and how musicians will be compensated in the future.

About the Future of Music Coalition:

The Future of Music Coalition is a not-for-profit collaboration between members of the music, technology, public policy and intellectual property law communities. The FMC seeks to educate the media, policymakers, and the public about music / technology issues, while also bringing together diverse voices in an effort to come up with creative solutions to some of the challenges in this space. The FMC also aims to identify and promote innovative business models that will help musicians and citizens to benefit from new technologies.

About the Pew Internet & American Life Project:

The Pew Internet Project is a nonprofit, non-partisan think tank that explores the impact of the Internet on children, families, communities, the work place, schools, health care, and civic/political life. The project aims to be an authoritative source for timely information on the Internet's growth and societal impact. Support for the project is provided by The Pew Charitable Trusts. The project's Web site: www.pewinternet.org

Completion Rate

Based on figures supplied by WebSurveyor, PSRAI has calculated the following completion rate for the Musician Survey:

| TABLE 1: Survey Completion Rate | | |
|--|---------------|--------------|
| | <u>Number</u> | <u>Rate</u> |
| Total Hits | 5,702 | |
| Total Starts | 3,918 | 68.7% |
| Ineligible respondents (not a musician, songwriter, or music publisher) | 130 | |
| Total Eligible Starts | 3,788 | 96.7% |
| Total Completes | 2,793 | 73.7% |
| Final Completion Rate | | 73.7% |

In Table 1, total hits (5,702) indicate the number of times the survey link was accessed, or roughly the number of potential respondents who reached the survey's title page, though no control was in place to prevent someone from accessing the link more than one time. The link took people to the survey title page, which gave the following brief description of the survey and its sponsors, along with instructions for how to complete the survey:

Welcome to the Pew Internet & American Life Project's musician survey. The goal of this survey is to measure the impact of the Internet on songwriters and musical performers. Thanks so much for taking the time to help us better understand how the Internet affects your music, as well as how you communicate with other artists, artists' organizations, and fans.

Our survey will take most respondents about 20 minutes to complete, though it may be longer or shorter for some people. Most questions give you response categories from which to choose. Others are followed by a blank text area where you can write your answers. The text areas will hold up to 300 words, so feel free to make your answers as long as you like. You must provide an answer to each question in order to move to the

next; once you answer a question and move on, you will not be able to return to that question to change your answer.

Please complete the survey only once.

If you have questions about the survey, or if you'd like to send us additional input later, we'd be glad to hear from you at Music@pewinternet.org.

CONFIDENTIALITY NOTICE

As with all studies we conduct with our survey research firm, Princeton Survey Research Associates International, all of your answers are completely confidential. Responses are analyzed only in the aggregate, and are never linked to the individual completing the survey. No identifying information is required to complete this survey, other than basic demographic characteristics.

If you have any questions about this survey, or concerns about confidentiality, please feel free to contact MusicSurvey@psra.com or the Pew Internet & American Life Project at Music@pewinternet.org.

Go to <http://www.pewinternet.org> for more about the Pew Internet & American Life Project, or go to <http://www.psra.com> for more about Princeton Survey Research Associates International.

Total starts (3,918) indicate the number of people who, upon reading the title page, clicked the “next” button to self-select into the survey. Based on screening questions in the survey, 130 of these respondents were deemed ineligible because they were not part of the target population of musicians, songwriters or music publishers, and thus were removed from the final sample. That left 3,788 total eligible starts. Total completes (2,793) indicate the number of eligible respondents who completed the survey. The final completion rate for the survey is computed as the number of eligible completes (2,793)/the number of eligible starts (3,788), or 74%.

Questionnaire Development

The questionnaire was developed by PSRAI in collaboration with staff of the Pew Internet & American Life Project and their partners in the music industry. Many questions were originally asked in Pew Internet RDD telephone interviews with previous samples of adults age 18 and older and self-identified artists. Where appropriate, questions were modified to focus on music only (as opposed to artistic work in general), and to reflect the principles of online survey design which varies in some ways from telephone survey design.